

02 / PRACTICAL BUSINESS RESOURCES

Social media checklist

Plan purposeful content, publish consistently and measure the conversations that matter to your business.

Choose your direction

- ☐ Choose one primary goal, such as qualified enquiries, repeat purchases or recruitment. Define what success will look like.
- ☐ Describe your audience's questions, interests and buying concerns. Use actual customer conversations rather than assumptions.
- ☐ Choose the channels your audience uses and your team can maintain. A strong presence on two channels beats six abandoned profiles.
- ☐ Update profile images, business details and biographies. Include a clear offer and a working link to the most relevant page.
- ☐ Set three or four content themes, such as practical advice, customer questions, proof of work and behind-the-scenes insight.
- ☐ Agree who creates, approves, publishes and responds. Set a realistic approval deadline so useful content does not get stuck.

Prepare your content

- ☐ Build a four-week calendar with a purpose, audience and next step for each post. Leave room for timely, relevant updates.
- ☐ Create a reusable asset library with brand guidelines, approved photos, customer permissions and consistent templates.
- ☐ Write a clear opening that gives people a reason to keep reading. Share useful information before asking them to buy.
- ☐ Plan short videos around one point. Collect usable raw footage or arrange filming separately before committing to a schedule.
- ☐ Add captions to videos and helpful alternative text to images. Check readability, safe text placement and platform dimensions.
- ☐ Check claims, spelling, links, music licences and image rights. Get permission before sharing identifiable clients or employees.

Need a second pair of eyes? Book a free consultation.

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Publish and take part

- ☐ Schedule at a frequency you can sustain. Test posting times against your own audience data rather than generic advice.
- ☐ Tailor each post to its channel. Adjust format, tone and links instead of publishing the same version everywhere.
- ☐ Include one relevant next step, such as reading a guide, answering a question or enquiring about a specific service.
- ☐ Check the published post on a phone. Confirm crops, captions and links work as intended after scheduling.
- ☐ Monitor comments and messages during agreed hours. Give helpful replies and move private details into a suitable secure channel.
- ☐ Keep an escalation plan for complaints or sensitive messages. Restrict account access and enable two-factor authentication.

Learn what works

- ☐ Add consistent campaign tags to website links where useful. Confirm analytics and tracking respect visitors' consent choices.
- ☐ Review meaningful engagement, website visits and enquiries alongside reach. A large audience is not automatically a useful one.
- ☐ Ask your sales or reception team which enquiries mentioned social media. Capture feedback that platform reports cannot show.
- ☐ Compare results by content theme and format. Repeat what helps your audience and stop posts that have no clear purpose.
- ☐ If boosting content, set a separate budget, audience and conversion goal. Review advertising rules before running paid campaigns.
- ☐ Set next month's three priorities and assign owners. Record what you learned so your plan improves rather than simply repeats.

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